How to Add and Remove Assistants

What can Assistants do?

Assistants perform administrative functions for the person who assigned them.

Filer Assistants can enter data for a Filer but cannot eSign or amend a Filer's Report. Only a Filer can add their Filer Assistants.

Supervisor Assistants can approve or deny pending filers, and can review the status of a Filer's Report.

Senior Legal Counsel Assistants can do everything that the Senior Legal Counsel or Ethics Counselor can do, but Senior Legal Counsel Assistants cannot eSign a Report.

Overview

This guide explains how:
- Filers add assistants
- Reviewers add assistants

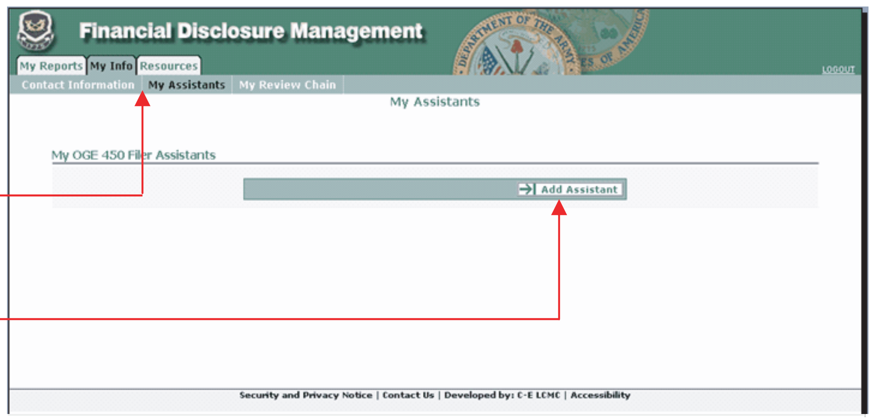
The FDM pages used to add and remove Assistants are the same no matter what kind of assistant is being added or removed

Adding and Removing Assistants

1. Go to the My Info > My Assistants Page

A From the My Info tab, click My Assistants.

B Click Add Assistant.



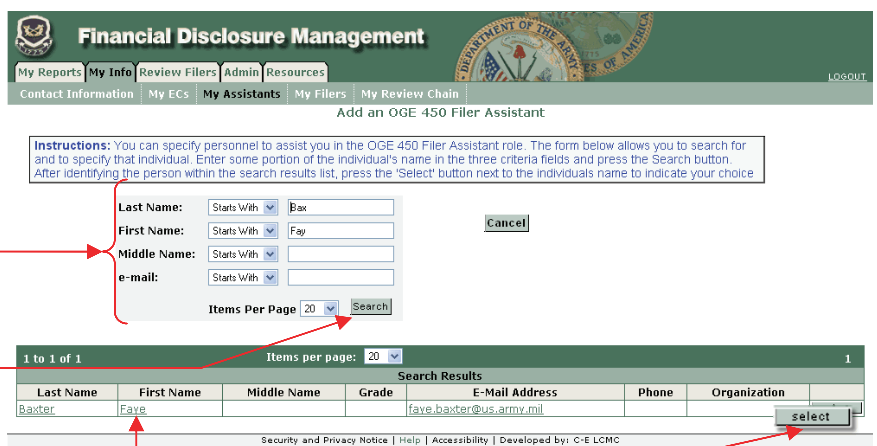
2. Select an Assistant

A Enter the first few characters of your assistant's:
- Last name in the **Last Name** field.
- First name in the **First Name** field.

B Click **Search.**

C Locate the name in the **Search Results** list.

D Click **Select.**



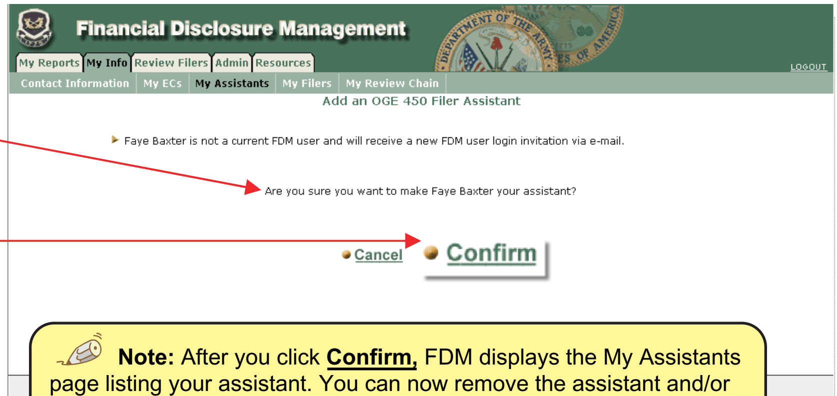
Note: FDM cannot display more than 200 search results. To reduce the number of possible results, enter additional search criteria. Example: Enter your assistant's e-mail address in the **e-mail** field.

How to Add and Remove Assistants

1. Confirm Your Assistant

A Review for accuracy.

B Click **Confirm.**



Note: After you click **Confirm,** FDM displays the My Assistants page listing your assistant. You can now remove the assistant and/or add other assistants (see below).

2. Remove Your Assistant

A From the **My Info** tab click **My Assistants.**

B Click **Remove.**

C Click **OK.**